

Built To Scale, Not To Break: A Growing Population Health Organization's Guide To People + Finance Infrastructure

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2026 OPEN MINDS EXECUTIVE LEADERSHIP RETREAT

Built to Scale, Not to Break:

People and finance lessons from a
growing population health organization

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A peer-to-peer story, not a showcase.

How Alera Health grew from a startup-stage population health organization into a scaling, multi-network operation — and what it took on the people and financial sides to get here.

01 • SETTING THE STAGE Who we are and why this room	02 • THE GROWTH STORY Four phases, seven to thirty-one	03 • THE PEOPLE SIDE HR infrastructure built in motion
04 • THE FINANCIAL SIDE Discipline before the revenue lands	05 • WHERE HR + FINANCE MEET One conversation, plus IT	06 • CLOSE & TAKEAWAYS What we would do again

SECTION ONE

Setting the Stage

PRESENTED BY

Kye & Jenna

Alera Health at a Glance

1

Population health management

We build and manage behavioral-health-focused clinically integrated networks across the US.

2

The connective tissue

Not a direct provider — we connect providers, payors, and communities.

3

ONEcare Networks

Behavioral health, primary care, hospitals, and social care under value-based contracts.

4

Mission-driven from day one

Founders and most of the exec team come from direct care. Every hire has ties to direct care.

5

Wilmington, NC

Headquartered on the coast, operating nationally across multiple networks remotely and onsite.

6

Small, agile, intentional

Thirty-one people. That is the competitive edge, not the constraint.

Why We're Here

01

The behavioral health landscape is demanding more from organizations of every size for payors, providers, and communities.

02

We grew a lean, mission-aligned organization with attention to people *and* finances at the same time.

03

Direct provider, network manager, or executive building infrastructure — the principles translate.



We are not here to say we've figured it all out.

We're here to share what worked, what was hard, and what we would do again.

SECTION TWO

The Growth Story

PRESENTED BY
Kye & Jenna

Where We Started, Where We Are

Founded with a small base team and a bold vision for integrated care.



Four Phases of Growth

2020–2022

Building the foundation

Core team, first systems, and the earliest network relationships.

2022–2023

Establishing the model

Navigating Series A investment, hiring ahead of revenue, absorbing startup opportunities.

2023–2024

Gaining traction

Brand refresh and continued fiscal growth. Infrastructure maturing, team stabilizing.

2025–forward

Scaling with intention

Multi-network expansion, national payor partnerships, with financial sustainability in view.

It is like building a house while living in it — hiring, writing policy, and managing cash flow all at once.

There is no pause button.

The Projected Path Forward

PHASE ONE

Investment

- The strategic plan targets significant network expansion over the next three to five years.

PHASE TWO

Traction

- Growth is multi-faceted: new networks, new contracts, new partnerships; all with increased opportunities.

PHASE THREE

Sustained profitability

- The strategic plan targets significant network expansion over the next three to five years.

“Where can we improve? How can we scale? And where can we manage costs while maintaining or increasing quality?”

Not a one-time strategic planning exercise. It is baked into how we operate day-to-day, across network creation & management, vendor relationships, HR, finance, and IT.

SECTION THREE

The People Side of Growth

PRESENTED BY

Kye Gardner

Building HR Infrastructure While the Organization Is Evolving

At seven people, the policy manual is your foundation.

At thirty-one, it becomes your house.

- We built HR systems in real time, alongside growth — with basic preparation.
- We hired for mission fit first and role clarity second, then managed through improvements to both.
- Our hiring process surfaces genuinely exceptional people — extraordinary talent is easily our biggest asset.
- Policy frameworks matured with the organization, in tandem with the culture being built.
- HR infrastructure is more than a formality. At this scale — it is a growth lever.

The Professional Employment Organization (PEO) Model: Co-Employer as Strategic Partner

ALERA OWNS

Day-to-day operations, direction, and culture. Every people decision stays ours.

OUR PEO SUPPORTS

Payroll processing, benefits administration, and HR compliance and policy.

WHY AT OUR SCALE

Enterprise-grade HR infrastructure and benefits access without building it in-house.

IF YOU ARE CONSIDERING A PEO

It works best when your internal HR lead is actively managing the relationship while prioritizing partnership — not just delegating to it.

Credentials, Counsel, and Competence

CREDENTIAL

SHRM-SCP certification

The senior HR credential, informing policy design, performance management, and compliance.

COUNSEL

Internal & External legal review as needed

Employment and compensation decisions get full legal review — FLSA, ERISA, policy language.

COMPETENCE

Leadership alignment

Working closely with C-Suite executives and department leads to align people operations with mission.

Many small organizations rely on just one of these layers.
The combination is the differentiator.

Key HR Infrastructure Built During Scale

1

Performance engagement

Formal review cycles, documentation tools, and continuous dialogue that create clarity for employees, managers, and leadership.

2

Compensation & benefits

Feedback loops, market analysis, reporting, policy creation, and industry research to attract and retain top talent.

3

Professional development

A formal policy tied to performance and career progression, with a defined approval path.

4

AI & technology governance

One of our first custom policies — protecting proprietary information, personal information, and PHI while also maintaining SOC 2 and HIPAA compliance.

5

Quality improvement

Continuous review of policies & procedures, regular reporting and analysis, and feedback surveys that provide insight into areas for opportunity.

6

Employee handbook

Built with our PEO — EEO, remote work, PTO, and benefits, reviewed on a regular cycle.

People Practices We'd Replicate



Hiring for mission first — people who believe in the work stay and grow with you. Our people are our power.



Getting policy in writing early and reviewing regularly — imperfect documentation still creates clarity and protection.



Leveraging the PEO relationship fully — as a trusted resource, not just a vendor.



Connecting individual performance to organizational outcomes through incentive design.



Annual retreats as culture investment — a necessity for a distributed fully remote team, not a luxury.



Communication and strength exercises (e.g. DiSC, Clifton Strengths) and similar tools embedded into our annual rhythm and everyday culture.

What Has Been Hard: Honest Lessons

- 1 Building infrastructure ahead of need while keeping predictable cash discipline and healthy reserves.
- 2 Managing an intersectionally diverse, remote team with a lean HR function prioritizes communication, clarity, and agility in equal measure.
- 3 Performance conversations get harder as the team grows. The earlier you build that muscle, the better.
- 4 Coordinating the PEO, legal counsel, and internal leadership requires active management. It does not happen automatically.

SECTION FOUR

The Financial Side of Growth

PRESENTED BY

Jenna Emery

Financial Leadership at Our Scale

THE CONTROLLER

All accounting functions, financial reporting, budget development, and performance metrics — reporting to the COO.

THE CFO

Board-level strategic guidance with a managed scope and resource allocation.

IN PRACTICE

Tight coordination and clear lanes: the CFO brings strategy; the Controller executes and sustains it.

Financial decisions are made in partnership with HR, operations, and the executive team — never in isolation.

Financial Infrastructure Built During Growth

Budgeting and forecasting became increasingly more formal— annual budgets and variance reporting.

Budget-to-actual review on a standing cadence — a **discipline**, not a once-a-year exercise.

Documented accounting practices and internal controls expand with growth.

ProForma modeling: a living model mapping revenue projection to network growth for board decisions.

Financial literacy across the team, so sustainability is a shared language and not just Finance's.

How We Think About Financial Growth

Revenue is multi-faceted — each **network**, each **partnership**, all a new **financial chapter**.

Navigating investment, growth, and increased revenue means absorbing short-term costs for **long-term positioning**.

Trend lines and snapshots track key progress. We track direction: **are we moving toward sustainability?**

Fiscal sustainability is multi-faceted: Bottom line, cash position, revenue, growth projections.

We **project forward conservatively** and stress-test assumptions on a regular cycle.

The CFO Partnership Model: What to Know

FIT

Works well at our stage: strategic financial expertise without a full-time executive cost.

PREREQUISITE

Requires a capable Controller executing day to day. The model only works with the right internal team.

COORDINATION

Clear communication with HR and operations is essential. Finance cannot operate in isolation.

COMPLIANCE

Legal review of compensation structures — FLSA and ERISA — is built into our process.

Financial Lessons for Growing Healthcare Organizations

Budget for the team you need, not the team you have. Hiring delays cost more than they save.

Build financial reporting early. Board-ready reporting requires systems, and systems take time.

Tie financial performance to people performance. When employees see the connection, it matters.

Model best, base, and stress scenarios — especially with delayed payment cycles and contract complexity.

SECTION FIVE

Where HR and Finance Meet — Oh, and IT is Here Too

PRESENTED BY
Jenna & Kye

Why HR, Finance, and Operations Stay Aligned

At a small organization, every people decision has a financial consequence — and every financial decision has a people consequence.

Compensation design, headcount planning, benefit selection, and Professional Development investment are all modeled against budget.

Workforce planning ties hiring timing directly to network launch schedules and revenue forecasting.

Regular reporting, industry research, and re-alignment as growth happens is key.

The Vendor Ecosystem

Knowing what to build internally, what to outsource, and then actively managing those relationships.

PEO partner

CO-MANAGED BY HR & LEADERSHIP

HR compliance, payroll, and benefits infrastructure.

CFO

COORDINATED BY CONTROLLER & COO

Strategic financial leadership without a full-time executive cost.

MSP partner

CO-MANAGED BY HR, SECURITY, & CONTROLLER

IT support, cybersecurity, and day-to-day asset & software management.

The common thread: we don't hire vendors and step back. We **stay engaged**, hold them accountable, and evaluate them through the same lens we apply to everything else.

Our Shared Operating Model

HR & Finance coordinate directly with senior leadership. Alignment at the top makes alignment everywhere else easier.

We share and regularly communicate in a **common language**: mission, outcomes, and sustainability.

Regular coordination with the CEO, COO, and board keeps decisions in full organizational context.

Our **power is our people**. We ensure each decision is sound, incorporates feedback, and evaluate impact.

What This Means for Population Health Managers and Providers

FOR POPULATION HEALTH MANAGERS

We sit at the intersection of clinical, financial, and operational complexity. Running a tight internal organization is how we serve our networks well.

FOR DIRECT PROVIDERS

Partnering with a population health manager means gaining operational and financial infrastructure you may not have to build yourself.

FOR EXECUTIVES IN THIS ROOM

Building people and financial systems in parallel applies regardless of your organization type.

SECTION SIX

Close and Takeaways

Three Things We'd Tell Our Earlier Selves

01

Build infrastructure before you think you need it

You are already behind by the time it feels urgent.

02

People and finances are the same conversation

Get your HR and finance leaders in the same room early and often.

03

Know what to own and what to partner on

Manage your vendors like strategic partners, not service tickets.

“Where can we improve? How can we scale? And where can we cut costs while maintaining or increasing quality?”

Questions for the Room

Let's open it up.

- 1 How are you aligning your people strategy with your financial planning cycle?
- 2 Which external partnerships — PEO, strategic leadership, MSP — have you tried, and how do you manage them?
- 3 For those working alongside population health managers: what would better operational alignment look like?

Thank you.

HOW TO CONNECT WITH US

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Turning Market Intelligence Into Business Advantage

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